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ABSTRACT

This report describes a self-assessment study undertaken by the University of California at Santa Barbara (UCSB) Library which was designed to describe current UCSB Library public services, investigate options and opportunities to enhance these services in anticipation of change, and make recommendations to ensure that the library continues to provide the best possible services to the academic community. The study was conducted in three phases by the Public Services Study team and its five task forces using the Public Services Study Model created by the Association of Research Libraries (ARL), Office of Management Studies (OMS). Library directions are discussed, and an optimal scenario is described, including components of the services and planning structure delineating organization, programs, technology, staffing, and facilities. An examination of study findings includes discussions of the issues and options of technology and access, library users, user education and awareness, organization, building library personnel, facilities, and planning; and recommendations grouped under the same broad themes follow. Study findings are presented graphically in four tables, and appendices include the study team charge, study methodology, task force charges, a listing of task force members, and a summary of reports issued as part of the Public Services Study. (KM)

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PUBLIC SERVICES STUDY FINAL REPORT

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PUBLIC SERVICES STUDY
FINAL REPORT

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I. INTRODUCTION

Academic research libraries in the 1980's are confronted with major technological advances that are changing the way information is created, perceived and used, making the traditional ways in which library services have been conducted no longer comprehensive enough to meet all of the library patrons' needs. In order to remain a viable and essential component of the university's information systems network and a major contributor to university instructional and research programs, academic libraries will have to be able to respond effectively to an environment of rapidly changing scholarly information needs and capabilities. Shaping access to information to best suit library user characteristics will be the challenge and the measure of success.

Faced with this challenge, the UCSB Library has conducted a self-assessment through the Public Services Study model created by the Association of Research Libraries, Office of Management Studies. The study was conducted in three phases by the Public Services Study Team and its five task forces, composed of library personnel at all levels. Faculty, students, and library personnel were polled on issues related to the study. Issues were studied in depth by task forces as charged by the Study Team and the University Librarian; their findings and recommendations have been synthesized by the Study Team to create this final study report and recommendations.

The purpose of the study has been to describe current UCSB Library public services, investigate options and opportunities to enhance those services in anticipation of change, and make recommendations to insure that the Library continues to provide the best possible services to the academic community. The undertaking of this study in itself implies a leadership role for the Library. Rather than waiting to react to new developments, the Library is taking a proactive stance in anticipating and planning for change.

This report is a philosophical statement of directions and provides a framework to begin a long-term intensive Library planning effort. It presents an optimal scenario for the Library's public services in the next five to ten years, provides a synthesis of all the study findings and their implications, and makes recommendations for reaching the optimal scenario. The emphasis of the study has intentionally been set on the future to provide a long-range context for resolving current issues and problems. Identification and analysis of current issues and problems in the study have been used to support the creation of the future scenario rather than being addressed specifically with short term solutions. There are obvious implementation and budget implications of this report. In Study Team

discussion with the University Librarian it was determined that these areas were outside the Study Team charge, and will be handled in the implementation phase following the study.

The task force reports are referred to frequently throughout this report. The Study Team considers them an integral part of this final report and intends that they be studied closely in light of the framework established by this report. Some of the task force recommendations have inevitably been modified in light of findings from other task forces or as a result of Study Team discussion. In most cases, however, the findings of one task force complement and reinforce those of another, and few issues have raised conflicting conclusions or solutions.

The findings of the Public Services Study are complex and detailed, as attested to in the five task force reports. Taken as a whole, they indicate that the Library has served its clientele well, while at the same time clearly pointing to a number of themes that set directions for future Library programs and services.

A number of points stand out in the analysis of study findings as indicators for change: the unevenness of the Library's current services; the uneven access to our collections; the need to accommodate new information technologies; concerns about the lack of adequate Library space; perceived low staff morale and planning deficiencies in the current organizational structure; staff readiness to experiment; and the opportunities identified that can enhance services to all patrons. What is being done well in some areas is not applied in all public service areas, and the Library has only begun to take advantage of some of the opportunities available to improve public services.

Technological advances have given the impetus to conduct this study, yet it has been the Study Team's perception and analysis of user needs as found in the study that have been pivotal in giving context to all other study findings and directing all recommendations in this report.

II. LIBRARY DIRECTIONS

The primary goal of this study has been to derive a framework for planning public services in the next five to ten years. To set that framework, the Study Team has concentrated on developing an optimal scenario that will describe components of the services and planning structure delineating organization, programs, technology, staffing, and facilities. The optimal scenario described below is actually a continuum, as some features can be accomplished or begin to show visible change in a shorter time period than others. All elements of the optimal scenario should be realized in the ten year timespan.

There are three key factors to the success of the optimal scenario: the quality of Library planning, the quality and commitment of Library personnel, and the support of the faculty and campus administration in the Library's programs.

The importance of Library planning cannot be overemphasized. All reports issued as a part of this study have stressed the need for planning and have recommended planning mechanisms. This study process itself serves as a model for staff involvement in planning, and attests to the need for careful oversight and monitoring of all programs and policies.

The Library administration will need to make a high priority commitment to the training and development of personnel if the Library is to meet the changes and challenges of future services. Library personnel individually must feel committed to the stated Library goals, and feel that they are accountable in carrying out those goals, see their positions as interesting and challenging, and be motivated to participate in the planning of new programs.

The faculty and campus administration will need to support the concept of the Library as a broader academic information center. This support will be won by establishing the Library's role as a teacher and leader in information technologies and services, and by developing library personnel capable of carrying out responsibilities outlined in the scenario below.

OPTIMAL SCENARIO

The Library's philosophy of service will rest on two tenets: making user needs central to planning Library policies and programs, and creating maximum access to information for our users. Both traditional library services and innovative services will be required to meet user needs.

The Library planning structure will be characterized by broad staff involvement and user input. Clear Library goals and objectives will be in place, setting the framework for planning long-term growth in space, staffing patterns, collections, and technologies. The planning structure will require regular monitoring of policies and programs.

Information services of all types will be an integrated network on campus, with the Library acting as the primary academic information center. The Library will be the leader in accessing all appropriate campus information systems related to research needs, and central in developing campus policies on the management and administration of information, coordinating services with other campus information centers as necessary.

The Library will project a strong, proactive image, taking the initiative in developing and providing service for information resources, promoting its information services and capabilities, developing innovative systems and programs for users by moving from an historically passive role to a leadership role on campus and in the University of California system. Leadership will be characterized by the development of the confidence to promote our role, establishment of strong faculty ties, and development of strong internal and external communication systems to facilitate staff and campus involvement in planning policies and programs.

The Library's primary users will continue to be the faculty, students, and staff of this campus. Student enrollment will continue to increase, causing strain on all campus facilities and services. Incoming students will be better prepared academically, but not necessarily in library skills. They will be more sophisticated in the use of computers and other new technologies. Research by both faculty and students will become increasingly interdisciplinary and specialized. The Library will need to provide user services oriented to subjects and disciplines as well as for various levels of skill and needs. As patron awareness and perception of library services and the powers of new information technologies increase, expectations and demands for information services will also increase.

The Library will take advantage of technological advances to enhance service capabilities. An online interlinked system will provide access to a local online catalog, acquisitions records, serials records, and circulation indicators. The system will contain at least brief listings for all holdings in all Library collections. Personal computers or their equivalents will be used as standard equipment for 1) accessing the Library's own interlinked system as well as resources outside the confines of our own collections, such as bibliographic and full-text databases; 2) communicating

with remote terminals on campus and networks off campus; 3) accessing new data formats collected in the library such as CD-ROM; 4) providing programs in user education and awareness; 5) creating new information systems; and 6) enhancing office operations in the Library. The Library will collect information in whatever formats necessary to support instruction and academic research on this campus, and will provide the necessary hardware to access those systems. The Library will actively experiment with and demonstrate new technologies for potential use in information services.

The Library will have a strong bibliographic instruction and awareness program based on the concept of the "teaching library". Instruction will be tailored to subjects and disciplines as well as to the various skill levels of users. Library instruction will be an integral part of academic programs in all fields, with the objective of making users sufficiently skilled in research techniques to work independently or interactively with both Library personnel and library automated systems. The Library will provide both traditional and innovative instruction services to accommodate the differing needs of users. Library services will be promoted through coordinated and active awareness programs that use a spectrum of media to target all levels of users.

The public services of the Library will be organized around strong subject and/or discipline needs with teams of subject specialists and support staff who will tailor information needs to the subjects or disciplines within their purview. Librarians will be subject specialists, and work in a primarily collegial framework based on building teamwork. There will be flexibility in position responsibilities at all levels of personnel, and middle management and coordinating responsibilities will be rotated to allow for both personnel development and organizational rejuvenation. The organizational structure will be flexible to accommodate the anticipated changes required to serve academic research needs.

A strong internal communication system will operate to keep all Library personnel aware of pending planning efforts and policy decisions, as well as involve all personnel in the decision-making process. Strong faculty ties will serve as the key to external communication.

The Library will have a high energy, confident and competent staff in a broad range of position classifications including librarians, library assistants, systems analysts, technicians, and management positions. Expectations and responsibilities of librarians and library assistants will have changed, with personnel assuming new and different responsibilities. Public services librarians will work

primarily as subject and technical specialists with more proactive roles in working with faculty, developing information systems, and keeping abreast of technological and academic advances. Support staff in many classifications will work with librarians in implementing information systems and handling technical aspects of Library operations. Emphasis will be placed on developing individual positions with the flexibility to allow for multifaceted duties and responsibilities and, where possible, cross-training, job enrichment, and advancement opportunities.

A strong staff training and development program will be in place to provide individualized development plans for all staff members. Programs of broad interest to the Library will be brought to campus; the Library will develop a demonstration center for learning new methods and technologies. Training and development programs will encompass subject, technical, management, and planning skills as dictated by individual needs to attain competency levels expected of changes in positions.

The Library will have increased space through a building addition, with clear priorities for the use of all Library facilities. Space will continue to be at a premium in the foreseeable future, and some materials will inevitably be placed in storage. The Library will be established as a quiet, academic environment with clearly separate areas for potentially conflicting uses such as study and reference use. There will be adequate space for library personnel, teaching facilities, the use and demonstration of new technologies, and service desks equipped with computer terminals. Facilities design will include a logical and clear arrangement of services for users, with service centers visible on the first floor, and sufficient signage and directional tools to aid users in locating services not directly visible. Facilities design will also address different formats of materials and preservation needs. Support equipment will be regularly serviced and maintained during all open hours by personnel available in the building who are trained to maintain heavily used equipment such as photocopiers and microform readers.

III. STUDY FINDINGS

A. Background

Most social and economic analysts agree that the United States has begun moving into an economy of information production, dissemination and related services, based on computers, automation, electronics and data processing. This changing economic structure affects the nature of education, the ways in which students are taught, and the career opportunities for graduates. Analysts also foresee in the next decade a trend toward technologically sophisticated and information services-related employment and the development of new information-related job classifications outside the high technology and information industries. These predictions imply an increasing demand for appropriate technical education to support this economy.

In addition to the greater need for technical education, academia faces three other issues which will have an impact on the nature of library services: a revolution in teaching techniques, the need to maintain a balance between traditional teaching missions and those dictated by technological changes, and the challenge to support increasing research.

The expanded use of new technologies will not only influence the employment market and the levels of education needed, but also ways to teach students. Innovative changes in teaching (i.e. computer-assisted instruction [CAI], use of audio-visual and electronic programs, and media-accessed courses) are permitting a greater creativity and diversity of educational instruction techniques.

The Library will continue to play an important role in supporting traditional teaching goals, but will also need to be flexible enough to support changing research and instruction needs. As society becomes increasingly sophisticated in the new technologies, there is a fear that it may lose sight of traditional humanistic values. Thus academic institutions will need to balance the new areas with traditional missions and functions: teaching students to value independent thought; to make ethical choices; to analyze problems and express conclusions clearly; to judge current events from historical perspectives; and to understand broad scientific principles and methods for weighing the implications of new discoveries in science.

Due to national and state fiscal constraints, the historically strong support for public higher education is no longer so abundant or predictable, increasing the

pressure and competition to obtain private funding from other government and corporate sources. The University of California (UC), and the University of California at Santa Barbara (UCSB) in particular, have placed increasing emphasis on obtaining extramural research funding. UCSB is making an aggressive effort to enhance its reputation as an intellectual center of national and international significance, and has placed a high priority on increasing extramural funding for research and instruction programs. This emphasis on research and the call for excellence will place new and shifting service demands on the Library, requiring it to keep pace with the expanding information needs of the campus research community.

In the past thirty years, UCSB has made the transition from a small liberal arts college to a large university. Efforts in the last fifteen years in particular to establish this campus as a major research institution have resulted in a distinguished faculty and an increasing rate of extramural funding. Campus planning documents state that UCSB has reached academic maturity and will now build on its strengths. The Library has reflected this campus growth and is now considered a major research facility with a collection that ranks it as a medium-sized ARL library.

The UCSB campus and Library are part of the University of California system, which consists of nine campuses and library systems respectively. The University system works as a built-in network, with libraries in particular linked through the "one library" concept outlined in The University of California Libraries: Plan for Development (1977). With the systemwide superstructure, some services and programs such as an online union catalog, a union list of serials, and shared acquisitions, have enhanced resources of individual campus libraries. On the other hand, each campus has also been somewhat constricted by trying to cooperate in development of systemwide programs where local needs may not be accommodated.

B. Library Issues and Options

Just as the move into an information-based economy is affecting academia and forcing a reassessment of its directions, the technological explosion that has automated library processes and created new information technologies has driven the UCSB Library to examine the nature and scope of its services to the campus academic community. In the sections that follow, themes developed in the study are examined in light of developing services in the ten year timespan.

1. Technology and Access

The findings of the Technology Task Force indicate that the Library has begun to provide enhanced services through automated systems, and will need to continue to adopt new technologies aggressively in order to provide high level information services in the future. While there are a number of unlinked automated systems currently in operation in the Library, the use of technology is uneven and has lacked coordination. Technical processing and support functions to date have been more fully automated than reference services. The Library has cataloged materials using online bibliographic utilities since 1980, and for three years there has been public access to the UC online catalog system MELVYL. The circulation check-out system for the Library has been automated for several years as well. Interlibrary loans are processed primarily through either online bibliographic networks or by teletype to other UC campuses. Bibliographic database searching is provided to patrons for a fee at service desks. There are personal computers (PCs) in virtually every Library department, primarily used for word processing and miscellaneous recordkeeping functions. Some Library personnel are trained in the use and maintenance of automated systems, others are not.

The rapidly evolving technology of information storage and retrieval will pose the most dramatic changes and the greatest challenges for planning future services. Technological changes projected for the next five to ten years will greatly increase current library information services and capabilities in four major areas: 1) storage of data and information, 2) access to and identification of information sources, 3) transmission of information, and 4) automation of office procedures and systems. In all four areas, however, a lack of standardization of utilities and protocols allowing linkages between systems, and issues such as ownership of information continue to be universal constraints to development. Despite this, there are current technologies that the Library can readily adapt and apply to increase user access and awareness of the Library's resources. The degree to which the Library is able to incorporate these new technologies into its services will determine the extent of its leadership in providing comprehensive access to information for this campus.

The UCSB Library currently provides information stored predominantly in traditional paper and microform formats accessed through printed indexing tools. While these formats, along with magnetic tape, have dominated as information storage media to date, new technologies such as videodisk, laserdisk, and CD-ROM are emerging as formats which can provide greater, faster, and more economic storage

and retrieval of many types of information. Scholarly information is being produced more widely in non-print formats--such as bibliographic, numeric and textual databases--for which no printed version is available. In some cases, databases are available that provide access to raw data and information that has been aggregated in printed publications.

These new formats increase the ability to access information exponentially by allowing manipulation of data and information to suit specific individual search needs. The Library uses this kind of power for patrons through customized searches in commercially available online databases. There are a growing number of databases, primarily numeric and textual, which offer the same possibilities for manipulation of data, which are not generally available in the Library's current collections and services.

While traditional formats will continue to be published, there will be an increasing number of information databases available only through these several new technologies. In order to continue to provide a high level of information service, the Library will need to incorporate these new technologies as appropriate. The Library's Collection Development Committee has begun discussion regarding the incorporation of the increasing number of databases into the Library's collections.

The findings of the Access to Information Task Force show that the need to provide maximum and timely access to information and resources will continue to be the driving force in providing information services. The two major challenges in providing that access are creating adequate access to the Library's collections, and expanding the Library's resources through telecommunications to tap re resources beyond our own collections.

The Library currently has uneven bibliographic and physical access to its own collections. The main card catalog provides full cataloging access to traditional monographs and serials, but several other major Library collections--such as government publications, technical reports, musical scores, and in-process materials--of interest to a wide range of Library users require special knowledge and awareness to access. The findings of the User Survey show that users consider it important that methods of access to information be easy to understand, readily available, and require little assistance. The survey also shows that collections not listed in the main card catalog are underutilized by patrons. Currently it is cumbersome to track down materials and information that have not been entered in the card catalog--such as titles on order, items received but not cataloged, and materials in circulation--

though both users and library personnel would like to have such information available.

To minimize the need for special knowledge to access these collections and materials, both the Task Forces on Access to Information and on Technology recommend that the Library develop a single online bibliographic system that would allow the development of a comprehensive listing of major collections, including those now unavailable in the main card catalog. The two task force reports outline specifications for such a system capable of including such features as both full and brief cataloging records, and providing access to the acquisitions, serials, and circulation systems to ascertain the status and location of all Library materials. The Library's Automation Committee is currently investigating online bibliographic systems in operation at other comparable institutions to recommend a local online system for this Library.

The Library currently has an online union catalog in the UC systemwide MELVYL catalog. It is a good prototype of a user-friendly union catalog, and is a valuable example of the kind of bibliographic access to external collections that this Library will want to develop. It has not, however, been able to accommodate all of our local bibliographic needs, because it cannot presently include all record formats, cannot be edited, and is not flexible enough to include all of the subsystems suggested in the online system above. The incompleteness of the MELVYL catalog has been a great frustration to patrons, as recorded in the User Survey findings.

Since it is not feasible for any library to have comprehensive research collections, the need to provide timely access to information resources not available in the UCSB Library remains a high priority for service. With increasing constraints on collection development budgets coupled with an increased ability to identify resources through online systems, there is expected to be an increased reliance on interlibrary cooperation for satisfying patron information needs. The Library currently participates in a number of consortia, such as the Research Libraries Group (RLG), and interlibrary loan networks, such as the Center for Research Libraries, which provide a range of practical services to develop interlibrary cooperation for information sharing. To date that cooperation has centered on physically borrowing materials through traditional interlibrary loan services.

With the development of networks and telecommunications, traditional interlibrary cooperation can be extended to include accessing remote full-text databases and transmitting information to local terminals. The quality and completeness of data transmitted is expected to continue

to grow. The implications for the Library are tremendous. The Library can potentially expand its holdings and resources by accessing remote systems as needed--be it for a specific information need, or membership in a bibliographic network, for such purposes as interlibrary loan.

The ability to access systems from remote locations requires enhanced telecommunications. Although to date the Library has been somewhat constrained by attempting to provide new technologies through standardized UC systemwide technologies, there are local campus cable and telecommunications possibilities that can be exploited to increase access to local and remote resources. UCSB already has a cable system linking remote terminals in the various campus departments with the Library by means of the broadband network. This network provides the potential to access any local online cataloging and processing system the Library develops, and to facilitate such procedures as submitting interlibrary loan requests, making acquisitions requests, requesting reserves and recalls for circulating materials, and sending other messages between the Library and campus Library users. In addition, the campus has access to the UC satellite communications system that provides potential access to remote systems and allows the sharing of UC resources, such as the MELVYL online union catalog. The UC systemwide Library Automation Review Committee has been evaluating automated systems needs and will issue its report this fall.

At the same time, personal computers (PCs) are becoming powerful enough to handle a wide variety of processing and searching systems, or act as terminals to access systems on mainframe or mini-computers. Online bibliographic databases available through vendors such as DIALOG are available for end-user searching on personal computers. The UC online catalog, MELVYL, has just become available to campus users in the last few months at their remote terminals using the campus broadband network. The MELVYL catalog will also soon provide access to MEDLINE as a forerunner of other shared databases. With broad applications of PCs in-house, the Library could improve its internal office and processing systems, and offer tremendously enhanced information services. Users with the requisite training will access Library holdings from remote locations, and will become more sophisticated and self-sufficient researchers of online databases.

2. Library Users

The primary users of the UCSB Library currently consist of 900 faculty, 2,000 graduates and 17,000 undergraduate students. Their characteristics, needs, and levels of satisfaction with the Library's services were sampled in the User Survey conducted by the User Needs and Education Task Force. [Table 1, p. 35] The survey results confirm some longstanding assumptions, highlight the importance of others, and provide a clearer picture of current and future user needs. For example, users rely heavily on traditional services and resources--such as the card catalog, interlibrary loan, and circulation--and do not take advantage of reference services, special collections, and innovative services, such as online searching, to any great extent. The Library is viewed by its users as a storehouse of traditional information resources. Patrons are likely to adhere to this traditional view of the Library for the immediate future, and may in fact push to retain conventional patterns of use as technology challenges the Library to move forward with new services.

On the whole, user satisfaction with Library services is generally well above par. Faculty rate "helpfulness of staff" highly, but view overwhelmingly that consultation with librarians is only "somewhat important" in doing research. [Table 2, p.36] Many users prefer to use resources independently rather than relying on staff or librarian assistance. One factor that reinforces this preference for independence is the problem of some users receiving inaccurate information and poor referral. The expertise of the Library's public services personnel, therefore, may be underutilized by patrons. Moreover, as technology enables users to become increasingly self-sufficient, new methods of monitoring levels of satisfaction, especially those of the "invisible" or non-user, will be needed.

Currently, most users who frequent the Library expect to have their information needs met by the collections at UCSB. They would like a dependable local online system for a complete listing of library holdings. For those whose needs cannot be met by present collections, a reliable, fast interlibrary loan system is a top priority. The findings of the User Survey disclose the general frustration that many users feel as a result of both the incompleteness of the MELVYL catalog and a perceived slowness of interlibrary loan. For the future, we can expect the issue of timely access to resources, both inside and outside the Library, to be a major factor determining levels of user satisfaction.

Patterns and frequency of Library use were also polled by the User Needs and Education Task Force. [Table 3, p.37] The findings of the User Survey reveal significant, visible

differences between users which result from their varying interests in using the Library. Students, for example, are much more frequent users of Library facilities than faculty, particularly as a study hall and a place to do class assignments, and are more demanding on Library personnel for their time and expertise. Accordingly, the needs of students center on what goes on inside the Library in terms of interactions with staff and how the facility is equipped and maintained. Some of the chief concerns of this group are having a comfortable, quiet environment in which to study, having adequate equipment (i.e. copy and microform machines) that processes and/or facilitates use of information, and having a readily available and well-informed staff capable of handling a broad range of subject-specific inquiries. Faculty, on the other hand, prefer to spend less time in the Library. They circulate more volumes per person than students by a wide margin, opting to take the Library home with them. Faculty interaction with staff focuses more on advanced reference and collection development needs. The needs of scholars and researchers, therefore, tend to concentrate less on the actual facility and more on staff subject expertise and the quality of collections. Remote access to our holdings and to those of other libraries will also be a chief concern to this group in the future.

Users not only differ by level and pattern of use, but also by discipline and subject needs. Researchers in the humanities, for example, consider the Library their primary "laboratory", whereas social science and science researchers use the Library in varying degrees to support research conducted in outside laboratories. Research in the different disciplines is also carried out through specific information networks, both inside and outside the Library. A solid understanding of how research is conducted in the various disciplines and how researchers use information networks to work within a specific research context can provide valuable insights regarding user concerns for access to information. This knowledge, which requires further investigation, could help the Library determine and organize future services and service points in order to remain an active part of those research networks.

University-wide and campus planning documents point to several future characteristics of students. A shift from the liberal arts to more career-oriented programs began in the mid-1970s. Reflecting that trend at UCSB, the largest undergraduate majors are now in biological sciences and economics, with the largest increases over the past five years in computer science, mathematics, liberal arts, economics, political science and physics. The largest graduate programs are in biological sciences, economics, chemistry, electrical engineering and education. Enrollment is expected to continue to grow--possibly reaching 22,000 by

the year 2000. Education planners expect incoming students to be better prepared academically than those now enrolled, and expect shifting demographics toward an increased minority and continuing education enrollment. Students are expected to have greater knowledge and skills in new technologies.

For the most part, our current constituency, however, is not aware of the potential uses of new technologies in enhancing research and information gathering. UCSB faculty do not see that technology will affect their research very much in the next five to ten years, and they, like students, tend to use traditional and familiar methods of research in the Library. Yet well over 50% of both the faculty and students polled expect to own their own computer in the next five to ten years; an even higher percentage expect to have access to computers on campus [Table 4, p.38]. Although users at this point do not associate the Library's resources with the new technologies and information formats, there is certainly an openness to trying new technologies that we can tap for educating users. It is expected that users' computer expertise will increase considerably in the next few years, increasing demands on the Library's capabilities to meet their information needs.

The implications of the Library's user profile are that we will need to educate our users about the changing nature and possibilities of information technologies. The sheer numbers of students will dictate finding ways to make users aware of resources and research techniques in an efficient manner. The Library will need to continue to provide traditional services in addition to new services necessitated by changes in information formats and technologies. This all-encompassing scope of library service assumes a continuity of diligent planning that is sensitive to the multiplicity of user information needs and that accommodates a preference for conventional service as it moves to meet the challenges of future demands.

3. User Education and Awareness

While the Library has excellent examples of bibliographic instruction, curriculum-related programs and formal orientation, their application has not adequately addressed all levels and disciplines of primary users. It is apparent from responses to the User Survey that many users are not aware of the most basic instructional services in the Library, and efforts to date have not been coordinated to reach all segments of our constituency. The overlying philosophy of the Library being an active instructional component of the education process is missing from the

current structure, thus making our education efforts stopgap.

Bibliographic instruction, furthermore, is not currently viewed by the campus administration or the Library as one of the major Library goals. A contributing factor to this situation is the nature of the Library's role on campus, largely one of a traditional repository of books and journals rather than an integral part of the teaching process. This becomes problematic when faculty members expect students to be knowledgeable about research techniques, but do not feel engaged in the process of developing those techniques in their classes. At the least they do not want to spend their restricted classroom time on teaching research and library techniques. At the same time, there is a limited and uneven interaction between faculty and librarians in this instructional process even though Library personnel feel that a solid background in library skills would improve the quality of student research, provide users with a basic understanding of how knowledge is structured in the Library, as well as develop familiarity with core reference tools.

User Survey results indicate that all levels of users see themselves as more knowledgeable in using the Library than do Library personnel. A basic dilemma is the user's sense that point-of-need assistance is a more efficient method of library assistance than spending the necessary time to develop general research skills, which could then be brought to bear when required by the specific case. This conflict in choice of approach to the appropriate means of getting information is common to all user groups, but is especially counterproductive for undergraduates who need to develop basic library skills. For faculty and graduates, it contributes to a narrowing of Library ties, which tend to concentrate on collection concerns, rather than reference or other service issues. Intermittent and random contacts with users cannot be expected to form the building blocks of the future, and yet a solid communication structure linking the Library with its constituency has not been formed.

The findings of the User Survey also bring to light several indicators that can provide guidance for developing a more effective and productive education and awareness program. Many users are unaware of or do not use Library collections and services relevant to their research. They also lack knowledge of the innovative technological possibilities that exist and are being developed to improve information access. Certain lacunae also contribute to a low level of awareness: there is no visible information service point at the entrance to the Library to direct users; the main card catalog and the MELVYL catalog do not contain all Library holdings; the reference collection is dispersed throughout

the Library; and Library publications do not cover all collections, procedures, and resources.

The effort to strengthen the relationship between the Library and users, and to broaden user education and awareness efforts requires a reappraisal of the Library's traditional role on campus. Adoption of the "teaching library" concept, as discussed in the User Needs and Education Task Force Report, would be a strong link for the Library in the teaching process. The core of this concept is a comprehensive bibliographic instruction program aimed at both the basic and advanced levels of users that would emphasize the development of research skills and make users aware of evolving information technologies for accessing the many resources available through the Library. The Library becomes an active participant in the instructional process, depending on strong cooperation and communication with faculty.

4. Organization

The organizational structure of the UCSB Library has evolved historically to provide functionally efficient and convenient services, largely of a traditional nature. The Library is organized around a centralized system rather than a branch library system to accommodate the interdisciplinary nature of research and to make the most effective use of its personnel resources. Library departments are structured by function or format rather than subject in many cases, so that the user may need to consult a number of areas in the Library to cover a single subject or discipline. Exceptions to this structure include the two divisional libraries, Arts and Sciences-Engineering, and the two ethnic studies units, Black Studies and Chicano Studies.

Analysis of the findings of both the User Needs and Education and the OCS Task Forces indicate that there are three factors that need to be considered in analyzing organizational structure: users' needs and use patterns; quality of public services personnel; and an effective communication structure. Users come to the Library with research needs geared to a specific subject or related subjects, and they look for a staff capable of providing subject-specific reference and instruction, as well as appropriate and accurate referral. The degree to which the the Library currently provides subject-specific services utilizing a team concept is uneven and limited to the divisional libraries and the ethnic studies units. Other services are not clearly defined by subject. The findings of the User Survey point out that many users are not aware of services relevant to their area of study, resulting in

underutilization of collections, services, and staff expertise. In many cases, underutilization of these resources can be attributed to low visibility, lack of promotion, and poor communication.

In some subject fields, resources are scattered throughout the Library, core resources and reference works are distributed throughout the collection, and librarians do not have the close interaction with one another that would minimize problems created by dispersed collections. In addition, collection development is not necessarily tied to reference and bibliographic instruction responsibilities for public service librarians, but is considered organizationally separate from public service. Public service librarians who do not have collection development responsibilities lack direct faculty contact to enable them to learn about research trends, directions, and interests, thus inhibiting active faculty ties.

The OCS Task Force report recommends restructuring public services around the three major disciplines--humanities, social sciences, sciences--to emphasize the subject orientation of user needs and to make the subject structure of Library services more visible in all disciplines. This subject center plan attempts to create a model in which the Library can interact with academic departments more effectively, adapt to change more flexibly, fully bond professional responsibilities of collection development and reference, and make subject matter rather than format the primary consideration in arrangement of information and services.

In the model proposed, such centers would operate with a high quality team of librarians and support staff in a variety of job classifications as needed in the center. All public services librarians would be subject specialists with collection development assignments relevant to specific academic departments. Information services at each center would be tailored to the specific needs of all levels and types of users in the academic subjects within their purview. Centers would operate on a collegial basis with all subject specialists having multiple responsibilities including traditional and online reference services, collection development, bibliographic instruction, development and implementation of information systems, and possibly original cataloging, with the degrees of responsibility for these areas to be divided among team members. An essential element of the subject center concept would be the bonding of reference and collection development responsibilities. All Librarians having collection development responsibilities would also have reference responsibilities; all librarians having reference responsibilities would also have collection development responsibilities.

Another essential element of this proposed organizational structure is the greater flexibility of positions and responsibilities built into the center's structure. Task force reports reveal that the amount of flexibility within service roles may influence morale and performance, and that the degree to which the work environment encourages growth and creative thinking can determine an individual's level of commitment and performance. The current organizational structure in many cases restricts mobility and career development for both librarians and library assistants, in that opportunities to gain experience in a broad variety of job responsibilities is not always available. The proposed rotation of middle management and coordinator positions could benefit both individual staff development and provide the organization with a built-in structure for fresh approaches to areas of responsibility. Rotation of routine jobs or combination of rote duties with more challenging ones would provide higher productivity and job satisfaction.

Strong communication with faculty would also be integral to the subject center organizational structure. One of the major responsibilities of subject specialists would be to develop ties with faculty, to keep pace with their research needs in developing library services, collections, and programs. Faculty would be included in the planning process to encourage academic commitment to directions that the Library is taking, and to ensure that planning remains pertinent to their needs.

The concept of creating centers organized to reflect academic subjects and disciplines is strongly supported by user desires for clear subject-specific information, instruction and orientation. The Study Team supports many of the elements of the model, such as the subject orientation of public services, the bonding of reference responsibilities and collection development, collegiality and the team approach applied to public services, the flexibility of positions and the rotation of middle management and coordinator positions, and the strong faculty contact. The Study Team feels, however, that the exact configuration and scope of subject service areas require more examination and analysis to ensure the best service to users. Among factors that need further examination before development of such an organizational structure are: the patterns of scholarly research; the need to balance scholarly research needs with those of generalists and undergraduates; integration and/or coordination of format-specific services such as serials and government publications within subject centers; efficient use of personnel resources; and appropriate levels of personnel and the number of hours at service desks.

The findings of the OCS Task Force also highlight communication as a major factor in the success of organizational structure, where mutual responsibility between administration and staff for strong two-way communication is central to creating a common understanding of organizational direction. Essential to such an understanding is a statement of objectives and goals, in order to facilitate coordination of responsibilities and encourage teamwork.

The OCS Task Force report points to several factors in the current organizational and communication structures that inhibit a clear sense of organizational direction and open information exchange. Library personnel polled do not perceive that there is a clear set of Library goals and objectives, nor a clearly defined communication structure. Survey results also indicate that a good communication structure exists within most departments, but that communication most often breaks down between departments, inhibiting teamwork and contributing to isolation and overall low morale. Library personnel are ready to experiment with and improve organizational and communication structures, and to have some fresh thinking on these important issues.

Findings from the Technology, Access to Information, and OCS task force reports indicate that the Library must also be concerned with its organizational relationship and communication channels with other campus information centers. Information services are not integrated in the campus organizational structure, but, like the current Library structure, are fragmented by format. Researchers must currently depend on campus facilities other than the Library to access some information resources, such as numeric and textual databases on magnetic tape. Both the Computer Center and the Learning Resources Center provide information services on non-print based information resources, yet there is no campus organizational structure that provides a formal relationship linking them with the Library. As the Library continues to change from a storehouse for printed materials to a broader information center, integrating a wider range of electronic and media information formats into its collections, there will be greater parallels and potentially increasing overlap in the services that the three centers provide. The campus structure for information services will need to be re-examined to merge some of these complementary functions.

5. Building Library Personnel

The task force reports indicate that Library personnel at all levels can expect to experience change in their job duties in the next five to ten years because of technological and organizational requirements. The roles of Library personnel will evolve as labor-intensive activities are automated, and as academic research techniques increasingly require specialization and in-depth knowledge.

As the Library moves from a manual environment to an automated one, there will be a broader range of position classifications for para-professionals. On the one hand, computerization will create a number of jobs which will require processing large amounts of data in a fairly routine manner, such as inputting acquisitions and cataloging records. On the other hand, Library support staff will handle the technical aspects of acquisitions and collection development. Those with subject, language, or computer skills will work with librarians and faculty to implement in-house electronic databases and automated systems.

Some level of experience with library automated systems, specific hardware and software, and other computer competencies will become prerequisites for entry level positions, just as they are increasingly now for librarian and upper-level support personnel. Many labor intensive jobs will be partially or fully automated, and will be handled by part-time staff and students. The Library will need to hire new classified personnel with technical competencies, as well as retrain current personnel in the required technical, team-building, negotiation, and communication skills.

Although the types of public services offered will vary according to characteristics and needs of each discipline, the overriding characteristics which will define public services will be their personalized and complex nature. Librarians will rely increasingly on technology for access to required information. They will need to be competent and knowledgeable searchers of online databases as well as be creative, stimulating teachers who can help faculty and students become competent end-users of online information. Librarians will also be responsible for developing and designing timely, user-tailored information services and access tools to in-house sources. They will be responsible for incorporating the latest state-of-the-art technology, such as artificial intelligence and expert systems, as information tools.

Subject specialists will spend a portion of their time in academic departments working with faculty and students in providing bibliographic instruction, developing orientation seminars and workshops geared to specific academic courses

and programs, working directly with faculty on collection development, and possibly working as part of a campus research project team. Librarians will be responsible for shaping faculty attitudes on the use and promotion of new information formats in teaching and research.

Librarians will need to have subject credentials as well as demonstrate confidence, high energy, and leadership in this environment. There will be significant requirements to work well in group settings, to manage time and personnel, and to set priorities independently. The Library will need to hire new specialists with these criteria in mind, as well as retrain (and re-educate) librarians currently employed. Librarians will need to keep abreast of technological and discipline advancements through courses, seminars, reading, specialized institutes and interaction with colleagues and faculty. Whereas formerly these activities may have been thought of as "supplementary" or "professional advancement", they will be a necessary and integral part of the librarian's responsibilities.

The quality of future public services will depend not only on developing library personnel knowledgeable in pertinent subjects and technologies, but also on assuring good interpersonal skills and high morale. In the transition from the traditional library to an information center, library personnel at all levels may need to develop time management, planning, and communication skills in particular to enable them to incorporate new skills effectively and to articulate plans and needs clearly.

The Library Personnel Office will need to take a larger role in developing skills of library personnel to successfully take into account these new job functions and the considerable challenges of the technological and research environment. The types of training needed for all library personnel to prepare for the future will be diverse and will extend outside the parameters of traditional in-service training and continuing educational programs. The program should be comprehensive and make a widespread impact at all staff levels.

The findings of the OCS Task Force indicate that there is a need to encourage the growth of such a personnel development program at the UCSB Library. Training and development to date have been uneven and determined more by individual initiative than a coordinated management effort. On the whole, Library personnel are at various stages of expertise in the technological, management, and interpersonal skills that will be needed in working in the optimal scenario. As organizational and technological changes are planned, change and growth in specific positions will need to be anticipated and planned. Individuals will need to be counselled to establish personal long-range development plans that prepare

them for future skills and position expectations, and they will need to be encouraged and directed to pursue training. Such an active, well-supported staff development program has the power to enlarge perspective, and emphasize high standards of achievement.

These achievement expectations will be more consistently realized if a recognized and accepted communication structure is an integral part of the staff development program. If channels of communication are blocked, staff may feel unable to anticipate or plan for their own future development, leading to fear of change, a feeling of helplessness, and a distrust of Library management. Alternatively, if a communication structure solicits the development of open dialogue and reflects input from Library personnel, staff will gain a sense of responsibility and accountability for their individual duties and Library goals and objectives.

The level of knowledge and morale strongly affect attitudes toward responsibilities and duties that are reflected in levels of service to patrons. The findings of the User Task Force survey show that patrons' perceptions of library service are determined by the quality of their interactions with Library personnel. While patrons surveyed indicated normally positive interactions with library personnel, there were indications of unevenness, some poor service, some inaccuracy of information referral, and some rudeness. Patron encounters with library technology can also be rewarding or frustrating, but technology has less influence on patron attitudes than the impressions formed from human interactions.

The level of morale can also have dramatic effects on productivity, work quality, absenteeism, and job turnover. It can either ensure or inhibit staff willingness to accept change and support new development programs, determine employee attitudes and commitment to organizational goals, and encourage or discourage excellence and creativity in performance. Morale in the UCSB Library has been perceived as low for almost a decade. The OCS staff survey polled library personnel on issues affecting organizational climate, level of performance, and morale. Results show individual morale to be much higher than perceived overall Library morale, and identified the major factors motivating performance and climate as the option for alternate work schedules, the degree of involvement in decision-making, the level of cooperation between librarians and library assistants, recognition and reward standards, job versatility and opportunities for growth, and a pleasant physical work environment. The importance of the need for the Library administration to address these issues in earnest and develop new ways to create a stimulating and rewarding work environment cannot be overly stressed, as the

level of morale so strongly influences the level of excellence of service and performance.

6. Facilities

With the exception of one divisional library, library collections are housed in one building in the center of campus to accommodate interdisciplinary research needs. Since the last major addition to the Library in 1977, it has become evident that the current library building does not have enough space for its various functions and ever-growing collections. In some departments, crowding often creates problems for users and staff. The findings of the Task Force on Facilities, Space and Equipment reveal that several service departments are severely pressed for space, particularly the Arts Library, the Sciences-Engineering Library, the Map and Imagery Laboratory, Special Collections, Government Publications, and the Oriental, Chicano Studies and Black Studies units. There will continue to be a tremendous demand on library space as enrollment rises and new technologies are adopted by the Library. Where study areas already compete with equipment, collections, staff and service desk requirements, the Library will need to place priorities on the allocation of space for various uses, with the goal of achieving a balance between these components in an organized and efficient way.

A critical factor in resolving space concerns may be the Library's ability to make judicious choices of what materials should and can remain in the Library and what can be stored. In at least the next five to ten years, the Library will not be able to house all printed materials as well as new equipment needed for expanded technologies. New technologies may offer the hope of eventual space saving, but solutions in the next few years depend on storage of printed materials outside the Library, either locally or in the Southern Regional Library Facility (SRLF). User acceptance of, and satisfaction with, this practice may be determined by the degree of ease and timeliness of access to stored materials. More resources may need to be invested in retrieval of stored materials if users are to remain confident in the Library's ability to meet their needs.

The findings of both the Facilities Staff Survey and the User Survey indicate that some needs regarding the facility, including access for the handicapped, quiet study areas (and noise control in general), adequate lighting, and controlled heat and ventilation, require the Library's close attention. By making sure that the building is properly heated and ventilated, noise buffered, and secure, the Library will be able to maintain a comfortable workplace that has as a priority the satisfaction of human needs and the

preservation of the collections. The Library has begun to address the issue of security with the hiring of several guards. Collections, however, need enhanced protection from theft, as well as a preservation program that would begin to address the Library's most critically deteriorating materials.

The findings of the User Survey reveal that the present facilities do not immediately orient the user to Library services and collections. For staff and users alike, it is desirable that primary information points be clearly visible at the main doors or located on major corridors in the building, and that physical layout and signage project clarity of design. Convenience of access and high visibility will continue to be major concerns; users want to feel their time is not being wasted by a lack of orientation or by having to make unnecessary inquiries.

Historical reasons for the current arrangement of departments and collections within the Library are no longer valid, have fallen into disfavor, or have proven unsatisfactory. One solution to the complexities of the Library's arrangement, which was expressed separately by users, task forces and staff, is an Information Desk located on the first floor near the main door, so users would have a more direct and immediate source of information about services in a complex building. Another obstacle to complete reference service is the dispersal of reference tools throughout the collection housed in this complex structure. Both the Users and Facilities task forces recommend a core of reference materials in proximity to service desks to provide the needed ease of access and awareness of new resources.

For internal efficiency, departments with physical relationships, such as those that deal with the same physical materials, need to be located as close together as possible. In the near future, physical distance between reference points remains a design consideration. With the growth of electronic information, however, departments with informational ties eventually may not require physical proximity, although proximity would still be desirable for direct patron use. It is also hoped that the online environment will alleviate some of the problems experienced because of the physical separation of some units that have complementary resources and services.

The findings of the User Survey also reveal the importance to Library users of equipment for processing information, such as photocopiers and microform readers. All groups of users, particularly those who must work with non-circulating collections and serials, voiced a strong desire for more and better maintained photocopy machines. Some materials, such as microforms, have special housing arrangements, but the

access and processing tools (i.e. readers and printers) are inconsistently maintained or are not available at the users' point-of-need.

Because of the heavy usage of such support equipment, there is a constant need for maintenance and repair. There is no one in the Library, however, who is specifically trained and responsible for the systematic maintenance and repair of such equipment, and there is no one available on weekends and evenings responsible for repair. Both the Facilities and Technology Task Force reports indicate that with the anticipated acquisition of new information formats, the Library will have an increase in the number and types of equipment to support information services sought by users. The current problems of maintenance and repair will only increase.

Electronic formats may ease the chronic space problems in the Library, but they will also expand the requirements for equipment to access these formats. The online environment has special requirements. Lighting, for example, affects the ease with which computers and terminals are used. Service desks and work areas will need to be designed with adequate room for online equipment. There will need to be space provided for training, demonstration and instruction in new technologies. The Library may need to supply machinery, such as scholars' workstations, for those patrons who do not have their own terminal or computer, or who can obtain the information only through library systems. The expanding uses of technology will also require that the building have substantial amounts of electrical circuits and outlets and conduits for potential changes in wiring.

The findings of the User and Facilities Surveys indicate that the physical appearance of the Library is important to both users and staff. In planning for the long-term growth of the facility, it will be important to maintain a sense of human scale, to carefully monitor the physical environment, to acknowledge a wide range of preferences in the design of the workplace, and to make a commitment to creating a comfortable and pleasant environment.

The proposed addition to the library building, projected for the 1990s, will not only help to solve the present space crisis but offers an opportunity for library planners to address the several facilities issues discussed above, including but not limited to: logical configuration of service points, departments, and collections; the incorporation of new technologies including their physical and electronic requirements; security; and building character. At every stage of growth planning, public service librarians must be actively involved and provide input into all architectural and design decisions. The amount of time and energy that the Library invests in the

control of its immediate environment will in itself be an articulation of a service policy.

7. Planning

The need for continuous and broad-based planning has been brought out in all task force reports and is central to all task force recommendations. A clear statement of directions and priorities for the Library is greatly needed to set the framework for planning in specific areas of Library services and operations. Results of the OCS staff survey point out that Library personnel do not perceive a clear articulation of priorities, goals and objectives for the Library. Task force findings also confirm that this lack of direction is demoralizing, inhibits teamwork, and frustrates planning by units within the Library.

Current planning is carried out primarily by a traditional line structure, with the Administrative Group and Department Heads participating in most planning projects. Some committees advise the Library administration on specific areas of planning as assigned. Task force reports recommend broader staff input throughout the planning process with better communication of planning efforts in progress.

The Public Services Study has served as a model for a broad staff-based planning effort. The model has been valuable in providing an opportunity for staff and librarians to work together in a new way; providing personal and professional enrichment; giving insight into the complexities and problems of planning; creating opportunities for management to interact with staff in a new way; allowing Library personnel to become involved and take some responsibility for their own future; fostering development of group ownership of the planning results; and broadening awareness and understanding of perspectives outside of one's own department and responsibilities.

The committee planning process encouraged wide participation within the Library from all levels of personnel. It also demanded extensive cooperation from department heads, supervisors and other staff in accommodating the amount of time and energy required by the project's participants to complete a comprehensive study. The considerable pressures exerted due to time constraints and unrealistic time and product expectations were tempered by the ultimate rewards of the process: a heightened sense of individual purpose, enhancement of interpersonal and analytical skills, increased understanding of the operations and organization of the Library, and a greater commitment to the mission of the Library through active involvement as instruments of positive change.

IV. RECOMMENDATIONS FOR REACHING THE OPTIMAL SCENARIO

The following recommendations for reaching the optimal scenario are interwoven; those in one area depend on and complement those in another area. The recommendations are on a continuum: the Library can begin working on some now with visible short term results; others will take several years to accomplish. Much of the detail for these recommendations is contained in the various task force reports and their recommendations. What is presented here are the major themes developed from an analysis of the task force reports together.

The recommendations are grouped under the broad themes covered throughout this report, with each theme section in priority order for implementation.

PLANNING

Broad planning recommendations are included in this section. Recommendations for planning as they relate to specific functional areas are included in the appropriate sections below.

1. Develop a clear document on Library goals and objectives with broad input from all levels of library personnel. Such a document should reflect the primary concepts that a) the Library's basic mission is to provide maximum information access to the campus instructional and research community; and b) all Library services are user oriented.
2. Establish a planning structure with written guidelines and procedures that involves library personnel at all levels in the planning, implementation, and evaluation of policies, programs, processes, and projects. All planning documents should include a mechanism for an ongoing and periodic reassessment of policies, programs and processes.
3. Appoint a small group of planners to examine the task force reports thoroughly in the context of this final report, to investigate unresolved issues raised and areas not fully addressed by the task forces, and to monitor progress on Public Service Study recommendations.
4. Schedule a series of meetings for library-wide discussion of this final report and the task force reports with their implications and impact for future planning.
5. Negotiate a strong position for the Library in developing campus policy on information services, including the Library's relationship with the Computer Center and the

Learning Resources Center, so that information access is seen as integrated on campus rather than segmented by format. Formal channels of communication and planning should be established with other major campus information centers to coordinate goals and objectives. Work with those centers and other campus departments to inventory and to assess the number and scope of information resource collections on campus outside the Library.

6. Incorporate users, and faculty in particular, in the Library's planning process, including user feedback mechanisms.

7. Periodically monitor user characteristics, needs, and satisfaction with Library services to determine changes needed in public service programs.

TECHNOLOGY AND ACCESS

1. Establish a Library Office of Technology to be involved in all planning related to technology and telecommunications. This office will develop a long-range Library automation plan; coordinate services related to technologies; train Library personnel; advise on systems and products; study new formats; maintain and service Library equipment; and oversee a demonstration center for new products and automated services.

2. Develop a local, user-friendly public online system that can be accessed from remote terminals, which includes all collections and materials in the Library. Include acquisitions, cataloging, serials, interlibrary loan and circulation records. The system must be able to incorporate brief records.

3. Expand the application of personal computers in all library departments for developing information systems for users, as terminals for online database searching and other public service activities, for developing and accessing the local online system, and improving Library operations and office systems.

4. Continue to broaden the Library's collection development policy to include materials and information in all formats relevant to research needs. Support those formats with hardware and software necessary to access those systems.

5. Explore uses of telecommunications to provide remote access on campus to our local online catalog (as is now being done with the MELVYL catalog); to give end-users direct access to appropriate bibliographic and textual

databases and cataloging utilities (OCLC, RLIN); and to facilitate communication between Library units, and between the Library and campus departments for such services as current awareness of new materials, interlibrary loan requests, and document delivery.

6. Work toward the goal of having scholars' workstations. Develop and/or acquire user-friendly systems that make searching protocols to numerous systems as transparent as possible.

7. Continue to plan for interlibrary loan services and resources that will support increased requests for materials, expanded document delivery, and increased use of telecommunications networks.

8. Encourage UC systemwide development of inexpensive access to electronic formats such as bibliographic databases, CD-ROM, and magnetic tapes to take advantage of the networking powers of the UC system.

USERS

1. Make user needs central to the development of all library policies and programs.

2. Orient public services to subject and discipline requirements, as well as to various levels of users. Focus on service needs of distinct groups.

USER EDUCATION AND AWARENESS

1. Establish library instruction as a legitimate, integral element of campus instructional programs, and adopt the concept of the "teaching library" to develop user programs.

2. Establish a Library Office of Instruction and Promotion to plan, coordinate, and execute instruction and promotion programs for all public service departments or centers.

3. Customize instruction programs, publications, and awareness tools to meet all of the different user levels and subject needs, using innovative methods and approaches to packaging and dispensing information about the Library's resources and services.

4. Promote the proactive posture and services of the Library to users.

5. Develop programs that involve active participation of faculty in Library concerns, services and development of resources.

6. Educate users to think of the Library as the resource for information in the broad sense rather than as a storehouse of printed materials.

7. Increase communication with Library users by establishing a multifaceted awareness program to promote services through brochures, campus newspapers and newsletters, radio, and computer-assisted information.

8. Create an Information Center on the first floor near the front entrance of the Library, equipped with promotional tools from each service department, in a variety of formats, from the printed to the electronic.

ORGANIZATION

The OCS Task Force recommends an organizational structure based on three discipline centers and suggests experimenting with client-centered groups. The Study Team feels there is considerable potential in the discipline centers model, and supports many of the elements of its structure. However, there needs to be further study to determine whether centers are the best way to meet user needs, or if some modification of the model would be appropriate. In addition, the Study Team recommends that client-centered groups be considered only after the basic subject/discipline concept has been explored and a subject-oriented services organization is established.

1. Orient all public services around subjects/disciplines to reflect the academic structure. Pay particular attention to the need for more visibility for the Social Sciences and Humanities.

2. Study further ways information is used and research is conducted in the various disciplines, options for the integration and/or coordination of format-specific services within subject centers, and appropriate levels of personnel at service desks in order to determine the best configuration for subject/discipline organization of services.

3. Equip each subject/discipline service area with a large, indepth collection of reference tools relevant to its scope adjacent to its main service desk area.

4. Combine reference and collection development responsibilities for librarians to enhance subject specialist capabilities.

5. Explore the development of closer ties between subject specialists and original catalogers in the same subjects to expand the team concept.

6. Develop a reliable, comprehensive communication structure for information channels which stress two-way information exchange and accountability in the Library organizational structure. The internal communication system should provide timely, informative and accurate information, establish communication channels between departments, and give Library personnel an opportunity to participate in the communication network. Use mechanisms such as regular all-staff meetings, regular department meetings, regular reports from committees and administrators on policies and activities, in-house newsletter, forums, interdepartmental exchanges, and library-sponsored social activities.

7. Assign middle management and coordinator positions for no more than five year terms to reinforce the collegiality of subject-oriented services, to allow for the development of supervisory and leadership skills on a broad scale, and to instill a fresh outlook to management positions. Rotate committee assignments on a regular basis to allow broader involvement of Library personnel.

BUILDING LIBRARY PERSONNEL

1. Add a position to the Library Personnel Office specifically responsible for overseeing a broad local program of training and development for all Library personnel. This office will be actively involved in executing the recommendations that follow in this section.

2. Make a strong commitment to training and development of staff at all levels to gain expertise necessary to realize the optimal scenario. Training will encompass planning, leadership and interpersonal skills, and subject and technical expertise.

3. Make an inventory of staff skills and strengths, to be updated periodically. Such an inventory should be used in developing subject-oriented service teams, in identifying personnel to participate on projects and serve on committees, to facilitate consultation on specific problems, and in planning programs.

4. Develop long-term individual training and development plans to assure that Library personnel are prepared for working in the optimal scenario.
5. Provide flexibility in all Library positions for multifaceted responsibilities, cross-training, and potential mobility and advancement.
6. Establish a strong reward/recognition system for all Library personnel to encourage commitment and productivity.
7. Experiment with further ways to increase morale, such as improving the physical work environment, and permitting alternate work schedules.
8. Establish a management commitment to developing communication skills in all levels of Library personnel that recognize communication as a two-way responsibility.
9. Include a personnel/position element in all project and program planning documents. Such elements should detail levels of personnel, competencies required, and steps to fulfilling those personnel needs for the project or program.

FACILITIES

1. Continue with the planning process for new building needs, including design and space, by appointment of a special committee to address issues of immediate and long-term space needs.
2. Assign one or more public service librarians to work directly with architects on all building addition plans.
3. Investigate the Library's options for local and compact storage of materials.
4. Establish maintenance standards and procedures to maintain lighting, heating and ventilation, furniture and equipment to assure the Library has a comfortable and functional atmosphere and reliable equipment.
5. Pay attention to user orientation in the Library when designing service areas, including elements such as visibility, physical access, and signage.
6. Work to control noise in study areas by separating study space from reference and work space.

Of the recommendations listed above, a few stand out as the top priorities and initial steps for beginning the transition to the optimal scenario. The most important steps will be establishing a planning structure and developing clear Library goals and objectives. In addition, the Office of Technology and the Office of Instruction and Promotion should be established, and the Library Personnel Office should be expanded as soon as possible to begin outlining planning strategies in areas central to the success of the optimal scenario. Individual task force reports should be examined in light of the framework established by this report. An indepth study of the way researchers in various disciplines use information should begin as soon as possible so that planning for the subject/discipline centers and personnel planning for those centers can proceed. The Study also concludes that development of the local online linked system should continue as a top priority in achieving the primary goal of comprehensive access to collections for Library users.

Table I
Clientele/Survey Response
by Discipline

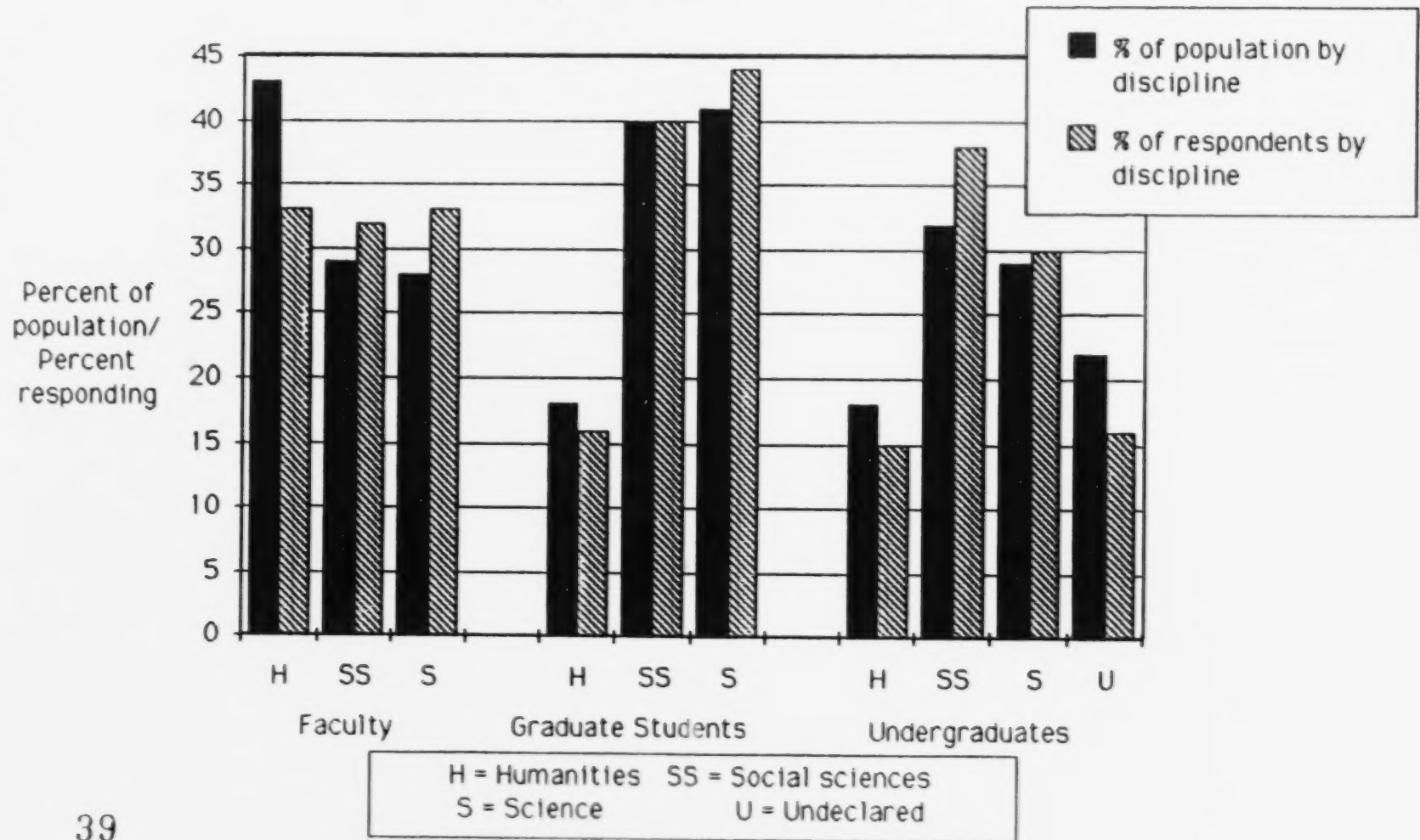
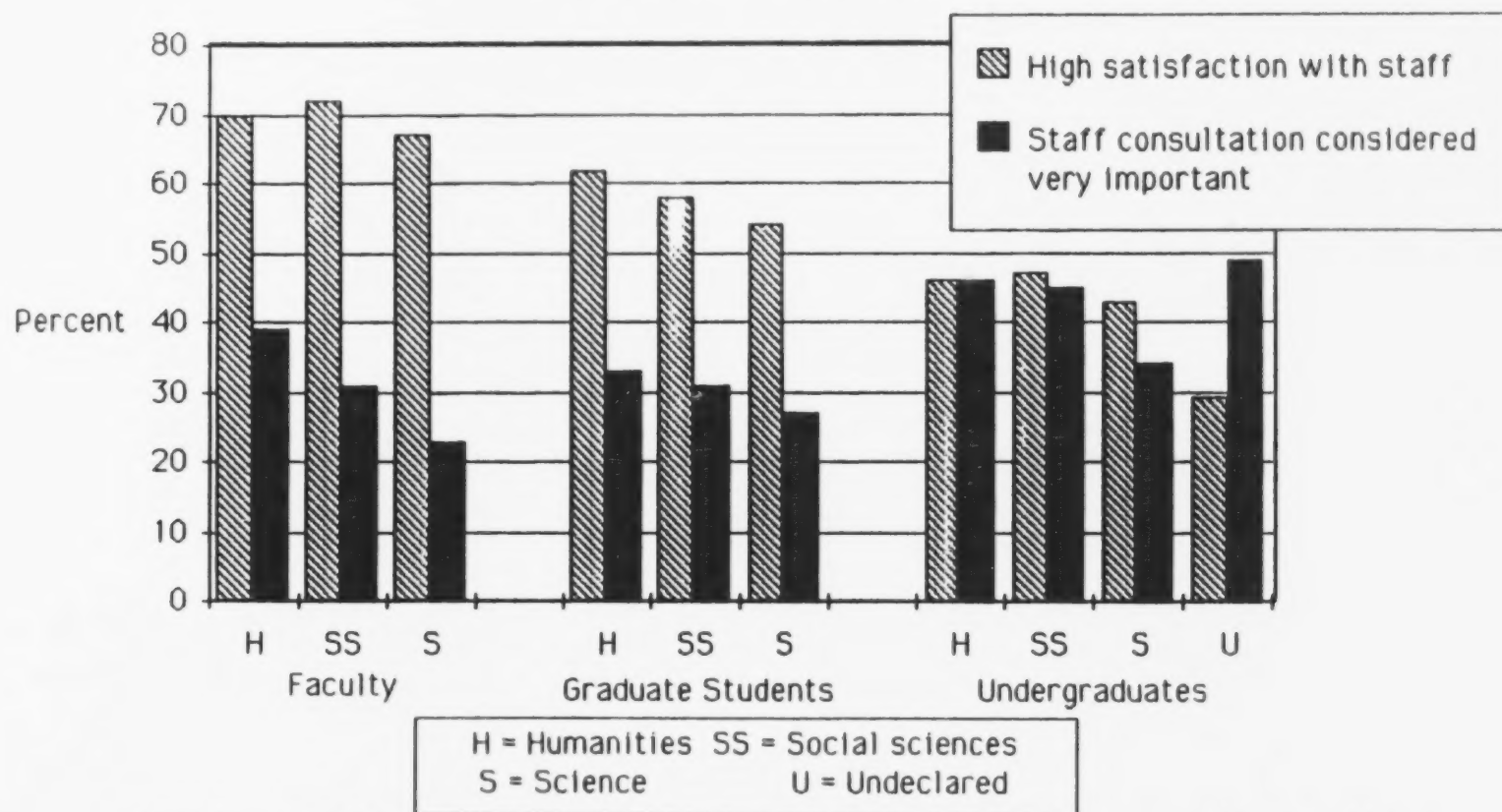


Table II
Patron Consultation with Library Staff:
Satisfaction level and Importance



These two variables were gathered independently and have only been superimposed here.

Table III
Use of the Library

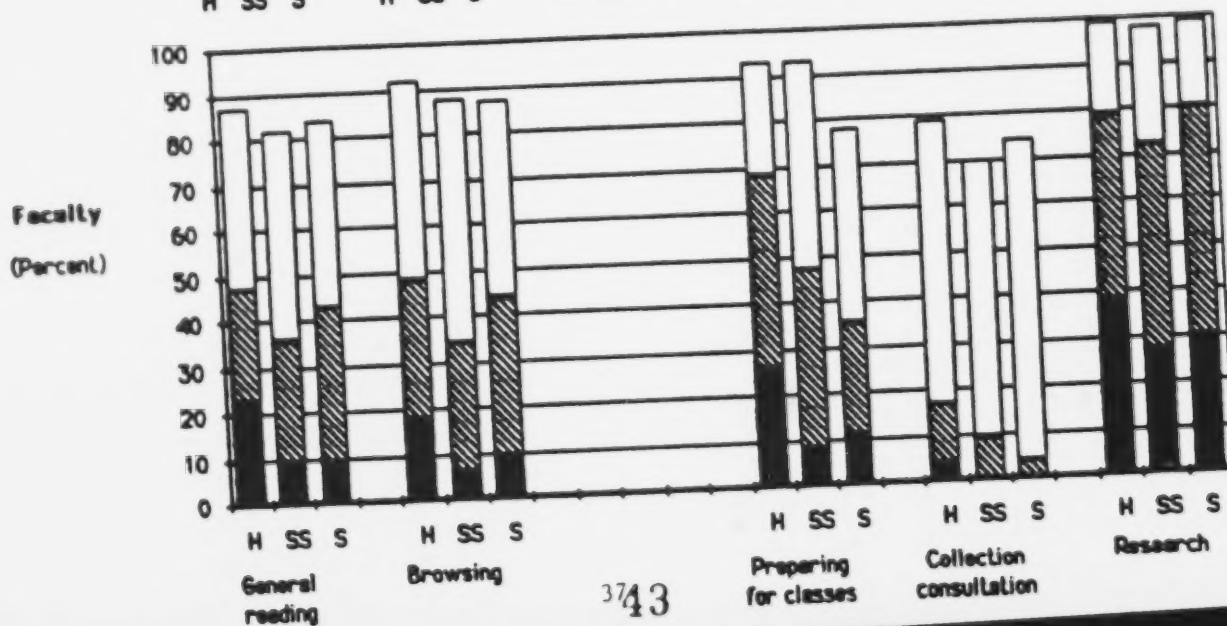
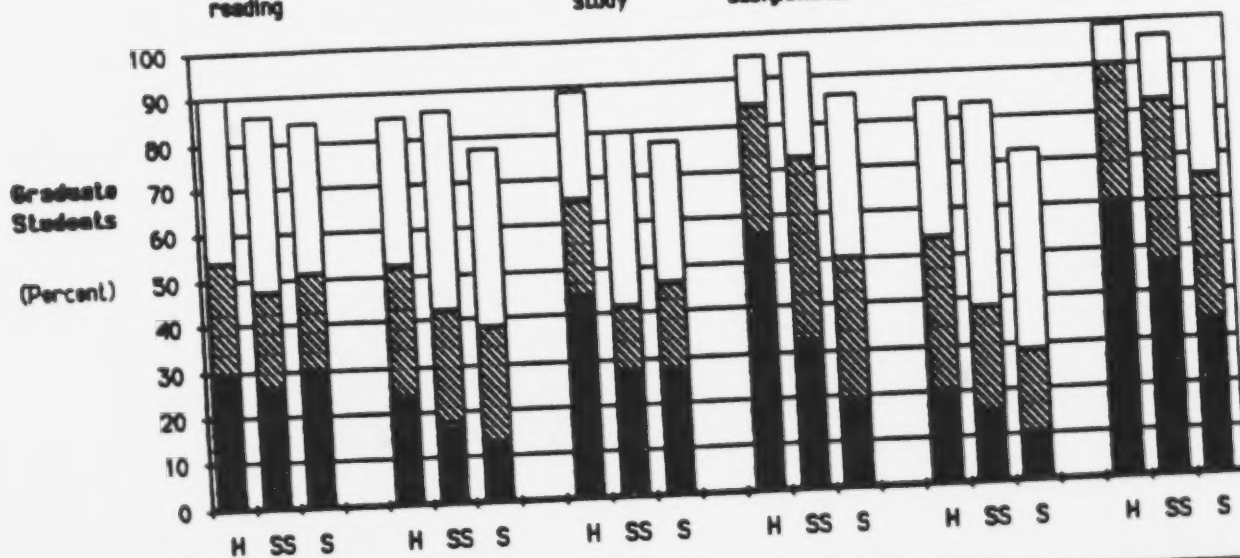
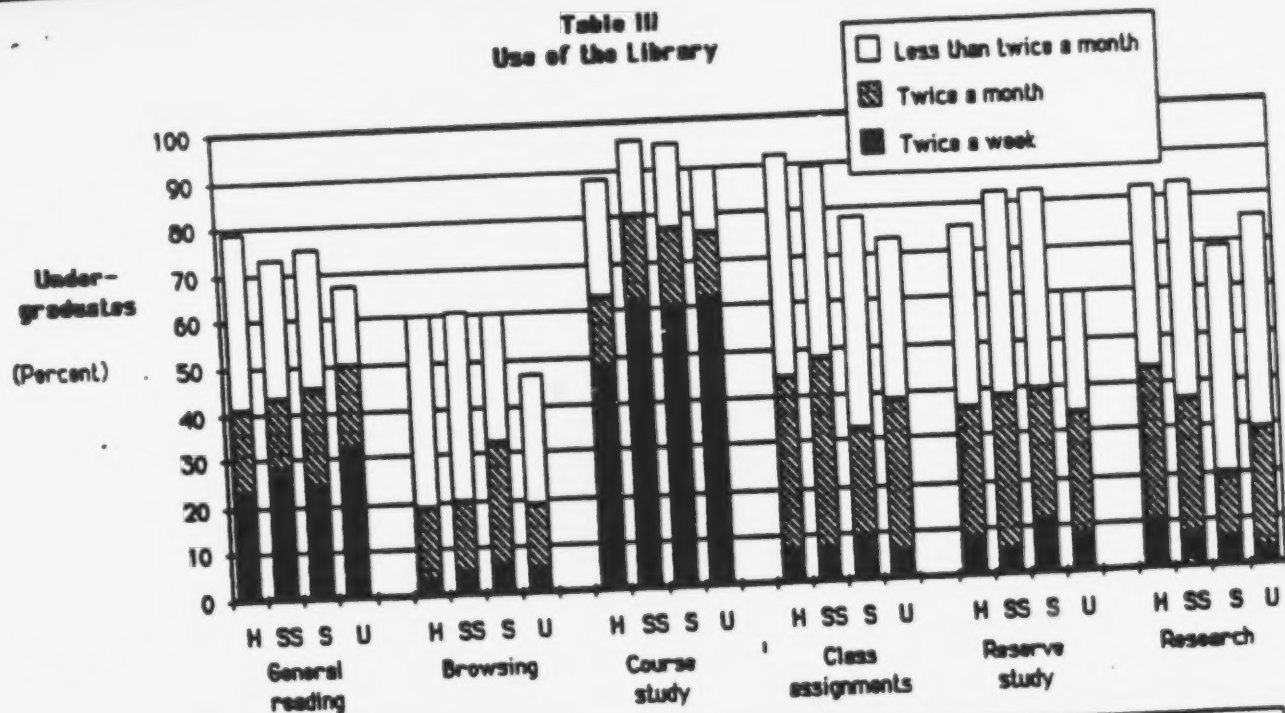
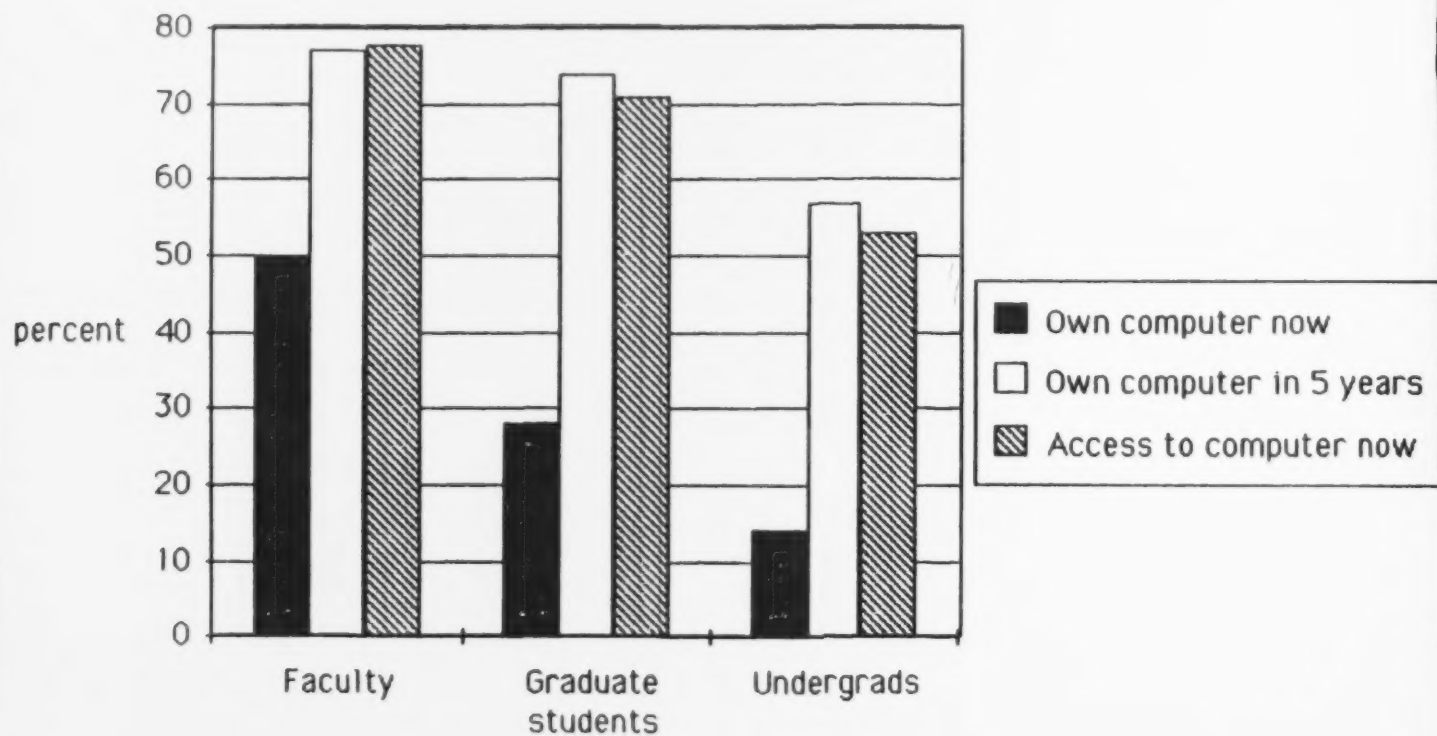


Table IV
Microcomputer Access



APPENDIX A

January 28, 1985

To: L. Snowhill, Chair
 S. Curtis
 N. Dubie
 A. Hodina
 L. Korenic
 S. Lentz
~~S. Moore~~

From: Joseph A. Boisse

Joseph A. Boisse

Subject: Public Services Study

Thank you for agreeing to serve on the Study Team for our Public Services Study. I can't emphasize too much the importance of this project. I am confident that you will lead our efforts to a successful conclusion.

The charge which follows expresses in greater detail what is expected of the Study Team and the Public Services Study.

Charge to Study Team

The environment in which academic research libraries must exist and operate is changing. The major challenge facing the academic research library is to monitor and respond to these changes in order to contribute in a positive manner to the future instructional and research needs of the University of California at Santa Barbara.

Faced with this challenge, it is appropriate and even desirable for this academic research library to conduct a careful self-assessment leading to a new strategy for the development of public services. The Public Services Study operated by the Office of Management Studies of the Association of Research Libraries provides a framework within which such a plan for this library can be developed.

Undertaking such a task in no way implies that existing services are inappropriate or unsatisfactory. On the contrary, general campus opinion rates the service provided by the library very positively. The fact that we are willing to look at ourselves in the context of what we see happening to higher education in general and our institution in particular in the future is intended to build on present strength and prepare for a demanding future. This undertaking will insure that we continue to provide the best possible service even as the environment in which we exist is changing.

Stated consisely, the desired outcome of the entire process is TO ASSURE THAT OUR LIBRARY SERVICES CONTINUE TO EVOLVE POSITIVELY IN RESPONSE TO OUR RAPIDLY CHANGING ENVIRONMENT.

In conducting the study, the Study Team should examine all of our public services, defined as essentially all of our activities except acquisitions, cataloging, and processing of library materials. Although these activities are not in themselves a part of this study, clearly the goals and performance of the departments responsible for them cannot be ignored during the study.

The areas which I assume the Study Team will want to look at are:

- o information and reference services
- o instruction and orientation
- o interlibrary loan/document delivery
- o computer-assisted reference services
- o services for special users
- o access to collections

This list is not meant to be comprehensive; other areas may well be of interest to the Study Team.

Some of the issues which the group will wish to look at are: priorities; innovation and adaptation to change; assessment of user needs/expectations; standards of performance; quality of service; measures of effectiveness; relations with administration, faculty and students; organization and staffing; and training and staff development. The Study Team may identify other factors which it wishes to examine as well.

In conducting the study, the Study Team will draw upon assistance provided by the ARL Office of Management Studies. The team should consult broadly and avail itself of all relevant library files and reports. It will also be important to maintain an appropriate level of communication with both the library administration and the entire staff. The final report should include four components: 1) a brief historical prospective, 2) an assessment of the current situation and needs; 3) a projection of the future situation, and 4) recommendations. The study is expected to require nine months to complete.

Your task will be challenging and stimulating even while it is demanding. For my part, I promise to do all that I can to support your work and implement your recommendations.

METHODOLOGY

The Public Services Study undertaken at the UCSB Library was designed and facilitated by the Association of Research Libraries, Office of Management Studies (OMS). The project was an "assisted self-study" which utilized library personnel in a group approach to planning and analysis. The study model was divided into three phases--(1) background; (2) fact-finding; and (3) synthesis--and used two types of groups, the Study Team and five task forces.

The Study Team, as charged by the University Librarian, was the steering committee for the project and had primary responsibility for the study--defining its scope, setting its goals, planning and organizing the various phases, and analyzing all findings to make final study recommendations. Members of the Study Team, consisting of five librarians and two support staff, represented six different public service departments and one technical services department. The task forces, made up of personnel from all staff levels and Library departments, worked in the second phase of the study. By involving thirty-nine Library employees in the study, the process addressed several peripheral objectives: building staff skills in strategic planning, increasing both staff problem-solving capabilities and knowledge of current issues, and raising awareness of the Library's responsibilities to our patrons and the University.

The primary objective of the first phase of the study was to obtain sufficient background information on the current political and economic climate, the status of academia and librarianship, the University of California system, UCSB, and the UCSB Library to provide the Study Team with the necessary perspective to effectively plan the scope and directions for specific areas to be studied in depth by the task forces in the second phase. These initial findings were issued as the Phase I Report, and were based on an analysis of existing Library and University documents, a list of issues collected from Library personnel, literature searches, and interviews with Library managers and campus administrators. In producing that report, the Study Team developed committee skills, and began to develop an understanding of the potentials, limitations and complexities of the study itself.

Four of the five task forces created for the second phase of the study were suggested in the OMS study manual: Task Force on Facilities, Space and Equipment; Task Force on Organization, Coordination, and Staffing (OCS); Task Force on Technology; and Task Force on User Needs and Education. The fifth, the Task Force on Access to Information, focused on a need to provide comprehensive bibliographic access to all the Library's collections, and the need to explore the

potential to increase user services through the ability to access information resources beyond the Library's collections, unrestricted by ownership, format or location.

Members of the Study Team acted as chairs, co-chairs or liaisons for the task forces to keep the Study Team involved and informed on the sub-groups' activities. The Study Team Chair did not serve on a task force, but acted as facilitator and coordinator among task forces, the Library administration, and OMS. The task forces did in-depth studies in their areas of concentration, as charged by the Study Team, reviewed and analyzed data, and developed recommendations on ways to improve public services in those areas.

Data gathering techniques used by task forces included in-house fact-finding, literature searching, interviewing, observation, and surveying. Observation tours were used by three task forces to view present conditions and identify problems with current services. Interviews that included Library and University personnel, and information specialists outside UCSB, as appropriate, were also conducted by all groups. At the time interviews were being planned by task forces, the Study Team arranged an information session for all task force members on interview techniques, which was given by the Library's oral historian.

Three task forces--User Needs and Education; Facilities and Space; and Organization, Coordination, and Staffing--chose to conduct surveys. A faculty member from the campus Social Processes Research Institute (SPRI) served as consultant to all surveys, helping each group to define the scope and expectations for their survey, to construct questions for meeting survey goals, to compute and analyze survey data using software designed for personal computers, and to assist with other technical points of conducting surveys. Administered by the Task Force on User Needs and Education, the Library User Survey provided a formidable array of statistics describing the Library's clientele and their needs, which were used by all of the task forces.

Three of the task forces--User Needs and Education, Facilities and Space, and Organization, Coordination, and Staffing--conducted surveys of all Library employees. These provided an opportunity for everyone to contribute ideas for improvements and to gauge staff perceptions of public services needs. Because of the sensitive nature of the information sought by the OCS Task Force, that survey was administered and the results tabulated by SPRI personnel.

In addition to the session on interview techniques and the consultation with SPRI, the Study Team arranged two other training programs for all task force members: one on time management; the other, a series of small group training

sessions on word processing with Microsoft Word, conducted by the Library's Data Services Coordinator.

Task force findings and recommendations were presented to the Study Team in five detailed reports. In the final phase of the study, the Study Team analyzed and synthesized findings and recommendations of the task force reports and the Phase One Report to develop the final recommendations presented in this document.

TO:

FROM: Joseph A. Boisse, University Librarian
Lucia Snowhill, Chair, Public Services Study Team

SUBJECT: Task Force Appointment and Charge

Thank you for agreeing to serve on the Task Force on Access to Information. This Task Force is an important and vital part of the current Public Services Study whose purpose is to assure that our library services continue to evolve positively in response to our rapidly changing environment.

For the past few months, the Study Team charged to oversee the project has been gathering background and other data that will be useful to Task Force members in conducting their work. In particular this includes profiles of the external environment, the University of California system, UCSB, and the Library. In addition it includes planning assumptions which provide a framework for the study and the work of the various task forces, and a descriptive inventory of current services.

Providing services involves virtually all the activities that make up the library. However, due to time and other limitations, this study can only concentrate on those activities that have the greatest impact on services. With this in mind, the following five Task Force areas have been established: 1) User Needs and Education, 2) Technology, 3) Access to Information, 4) Facilities, Space, and Equipment, and 5) Organization, Coordination, and Staffing.

In conducting your study, documents gathered and prepared by the Study Team in the first phase of the study and relevant sections of the OVS procedural manual, as appropriate, should be consulted. Library administrators and the Study Team will be available for consultation throughout the Task Force's deliberations. The Task Force may find it useful or advisable to seek assistance and information beyond the immediate library environs. Any activities, however, that include interviews, questionnaires, surveys, and/or consultations must be cleared with the Study Team and the University Librarian.

Charges for each of the five Task Forces are attached to this memorandum. In reviewing the charge to your specific Task Force, please bear in mind that the deliberations of the group need not be narrowly confined to the concerns/issues which are identified.

Task Forces may identify issues that had not previously been identified by the Study Team. The Study Team must be consulted on whether or not to pursue such issues. Some issues may have been given a lower priority by the Study Team and thus not included in Task Force charges, while others may not have been considered and should be investigated.

All Task Forces are to examine the current situation in their areas, look at alternatives, cost effectiveness of alternatives, implications for staffing, and make recommendations to the Study Team on ways to improve and increase quality and efficiency of public services in the next 5-10 years. In considering alternatives and recommendations, Task Forces should focus on

future directions within the scope of the Study, by recommending improvements in service, ways to achieving those service goals, and a process to evaluate Task Force issues on an ongoing basis.

There will be areas in which Task Forces will overlap. You should study the attached charges of other Task Forces to better understand what aspects of an issue may be covered by another Task Force. There will be several ways in which Task Forces can communicate with each other during this phase. All Task Forces will have access to the charges, minutes, and other informational reports from other Task Forces. Task Force chairs should discuss areas of mutual concern. Task Forces may consider holding joint meetings to discuss issues. All unresolved issues between Task Forces should be brought to the Study Team for resolution.

Task Forces will also communicate directly with the Study Team. There will be a member of the Study Team on each Task Force to act as a liaison in helping to interpret Study Team intent. Task Forces may consult with the Chair of the Study Team at any time. Task Force chairs will be asked to report informally as needed to the the Study Team throughout the Task Force phase, and all Task Force minutes and written reports should be made available to the Study Team.

To insure coordination of efforts each Task Force will be responsible for the following reports in the order listed.

1. Action Plan: This is a concise report detailing the areas to be examined, information needed, methodology to be employed, and timeframe for Task Force activities. Due September 15.
2. Monthly Summary Report: At intervals the Task Force chair will meet with the Study Team to discuss the Task Force's progress, to resolve problems that may have arisen, and to plan future actions. In addition, a brief monthly summary report should be submitted to the Study Team on the 1st of each month.
3. Minutes: Each Task Force should keep minutes of every meeting. These are to be submitted to the Study Team and to other Task Forces to facilitate coordination of this phase.
4. Final Report: This report should present the issues studied, provide a summary of deliberations, and make recommendations for future actions. The recommendations should look beyond the routine operational concerns toward the future, and cover services for a five to ten year period.

Since the Study Team is hoping to complete their final report by the first of the year, your final report will need to be completed by November 15th.

TECHNOLOGY

The Task Force is charged to broadly examine the question of how to use both existing and new technologies to increase and enhance public service capabilities. In examining this broad field, The Task Force should focus on:

Recommendation of priorities for the application of technology and the automation of library functions and services;

Changes taking place in the world of scholarly research and communication;

The universe of technologies available and appropriate to the UCSB Library;

Impact on user education;

External relations required in this environment (i.e., consortial agreements, ILL policies, networking, etc.)

USER NEEDS AND EDUCATION

This Task Force is charged to investigate and consider four general areas of concern:

The description of our present and future user population and the identification of its needs;

The role and program configuration of user education in the future;

Methods for increasing user awareness of library programs;

User satisfaction with current services and the identification of additional user services appropriate to the library's role in the future.

ACCESS TO INFORMATION

This Task Force will examine the two basic aspects of access to information: identification of the source of information; and access to the information itself either directly or indirectly. Under these broad headings, some of the topics which the Task Force will want to examine are:

What is meant by "timely access to information" as we look to the future;

How we can enhance access, both bibliographical and physical, to the collections in the UCSB library;

Recommendations for the coordination of public and technical services to insure optimal access to local resources;

Access to external resources;

Delivery of information to users.

The Study Team will provide the Task Force with a more specific list of questions related to each of these topics.

ORGANIZATION, COORDINATION AND STAFFING

This Task Force is to review the current organizational structure and the current staffing patterns of public service activities, and assess their ability to effectively meet future user needs. In its deliberations, the Task Force will want to consider:

The impact of the current organizational structure on public service activities and recommendations concerning future structure;

The overall coordination of public services;

Methods for improving communication and information-sharing throughout the library;

Recommendations to insure the optimal use of human resources;

Employee training, retraining, and career development in light of the changing roles of public services staff in academic research libraries;

Recommendations for improving the organizational climate of the library;

Recommendations to insure that staffing is appropriate to accommodate patron needs and use patterns.

Recommendations for insuring consistency in service policies and procedures.

This Task Force will focus on the overall delivery of public services as we look to the future and will avoid areas of individual personnel problems.

FACILITIES, SPACE AND EQUIPMENT

The Task Force will focus on how the library can best use its facilities, space and equipment to meet the needs of users in the future. It should consider the efficient and effective use of space and the impact of various public services on future space needs.

More specifically, it should consider:

Space needs for materials, users and staff;

Physical layout, i.e., location of and access to public service points;

Future equipment needs including furniture, shelving, copy machines, etc., and their location;

The management, maintenance, and security of facilities, space and equipment;

Physical environment, including lighting, and temperature, humidity, and noise control;

Design and location of signage;

The Library's ability to meet preservation needs.

APPENDIX D)

TASK FORCE MEMBERS

User Needs and Education

Edward DeWalt
Nan Djordjevic
Nancy Dubie
Eugene Graziano
Salvador Guerena
Dennis Hamilton
Ann Hefferman
Lynette Korenic, Chair
Laura Nanna

Access to Information

Kathleen Bonds
Sharon Bullard
Larry Carver, Chair
Patricia Gebhard
Alfred Hodina
Peter Pang
Erica Scranton
Andrew Shroyer

Organization, Coordination, and Staffing

Judi Aftergut
Linda Broderick
Carol Gibbens
Gail McCredie
Jo Anna Moore, Co-Chair 8/85-1/86
Patricia Pung
Robert Sivers, Co-Chair, 8/85-1/86
Chair, 2/86
Kim Thompson

Technology

Sylvia Curtis, Chair
Patricia Cronshaw
Barbara Hirsch
Gary Peete
Diane M. Russell
Kitty Uthe

Facilities, Space and Equipment

Susan Bower
Alex Gonzales
Susan Lentz, Chair
Virginia Lipkowitz
Joanne Murray
Lori Ritchie
John Vasi

APPENDIX E

REPORTS ISSUED AS PART OF THE PUBLIC SERVICES STUDY

Public Services Phase I Report. July 1985.

This background paper summarizes the economic, political and social trends expected to influence academic libraries in general and the UCSB Library in particular during the next decade. The nine campus University of California system and the systemwide library network that supports it are described. A brief history of the local campus and library lead up to a description of current operations at UCSB Library.

Report of the Task Force on Facilities, Space and Equipment. March 1986.

This report describes three options for addressing space requirements at UCSB: an addition to the existing building, the rearrangement of activities and collections in the present building, and limited rearrangement in order to address current minimal needs but save energy, time commitment and finances for the major rearrangement required for preparing new space.

The physical aspects of equipment provision and maintenance, furnishings and signs are addressed as well as the environmental concerns of heat, ventilation, noise control, and building maintenance and security.

Task Force on Access to Information. Final Report. April 1986.

The trends affecting access to information in general are examined: the growth of online databases, electronic publishing, changes in governmental publishing and difficulties in technology, e.g. lack of standardization. Present levels of access to UCSB collections are described in detail as well as the considerations essential to developing improved local access. An automated catalog, retrospective conversion and automated access to in-process materials are discussed.

Remote access issues covered include the use of Melvyl (the system-wide automated union catalog) to make system resources available and to enhance shared purchases and the importance of automation to maintain efficient access to off-site storage. Networking beyond the system is also described--specifically the National Inventory of Research Collections--which supports the interaction between enhanced bibliographic access and cooperative acquisition. Standards necessary to make any network viable are discussed at length.

Promotional activities to increase resource awareness in UCSB Library patrons are advanced. Document delivery services are examined and promoted.

Task Force on Organization, Coordination and Staffing. Final Report.
March 1986.

To support a balanced organizational structure, encourage communication and develop a responsive attitude toward patron and technological change, the report's first emphasis is the establishment of a public, coordinated, library-wide planning effort. This paper's most experimental section postulates the reorganization of the Library's public services into three broad discipline service centers and the establishment of two client-centered groups. Another pronounced change from current practice that is suggested is a new method for determining staffing patterns. Other recommendations include instituting a personnel skills assessment and a library-wide job audit, and expansion of library personnel orientation, career development and motivation and reward programs. An alternative work schedule experiment is examined.

Communications-related items include regular interactive meetings between staff and administration and regular office hours for management; more visible, interactive and "hands-on" management with a defined communication style; and a communications officer to manage sensitive communication problems.

Technology Task Force. Final Report. April 1986.

The advances in new technologies, telecommunications, data storage and manipulation and networking and their impact on and application to libraries and the UCSB situation are described. An in-house automated system for an online catalog and for serials, acquisitions and circulation control is explored. Interlibrary loan's requirements vis a vis automation are examined. The multitude of automated indexes and their requirements for maintenance, staff training and patron education are studied. How user education can be enhanced using the new technologies is covered. The importance of keeping up with new developments both intellectually and physically is emphasized, and a new office of technology and a demonstration area are recommended.

User Needs and Education Task Force. Final Report. April 1986.

Divided into three parts, this report first describes the current user population, its wants and needs, from information largely gathered from an extensive user survey. Projections are also made describing the same groups for the next decade. Secondly, user education developed into a more extensive program and attendant staff reorganization and training are examined. Thirdly, the promotional activities used to develop patron awareness of library services are delineated.